

AUTOMATED 24/7 CLIENT RECEPTION & ADVISORY INTAKE

Transforming Website Traffic into Qualified Enquiries.

24/7 AVAILABILITY

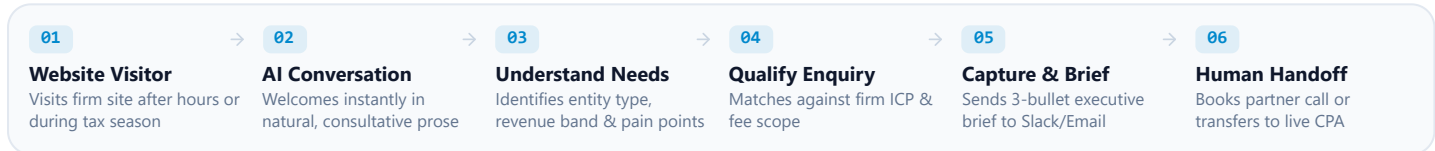
100%

Approved Firm Knowledge Grounding

Accounting firms can now automatically engage website visitors in real time. The WebCreato AI Consultant welcomes prospective clients, answers accounting and tax questions using your approved business information, qualifies high-intent enquiries, and hands over warm opportunities to your team 24/7.

• THE INTELLIGENT VISITOR JOURNEY

Zero dropped leads


• KEY CAPABILITIES FOR MODERN PRACTICES SOC2 & IRS Safe


24/7 Visitor Engagement
Welcomes prospects whenever they arrive, eliminating after-hours lead bounce.


Approved Knowledge Q&A
Answers common questions strictly from verified fee sheets and practice policies.


Natural Needs Discovery
Gathers entity type, turnover band, and software (QBO, Xero, NetSuite) smoothly.


Lead Qualification
Identifies high-value advisory retainers while politely filtering tire-kickers.


Automated Team Briefs
Delivers 3-bullet executive briefs to Slack, Email, or CRM (Karbon / TaxDome).


Warm Human Handoff
Escalates to on-duty CPAs for live take-over or books direct partner meetings.


Real-World Interaction
Live Example

VISITOR:
"We need help with bookkeeping and year-end corporate tax. What services do you offer?"

AI CONSULTANT:
"We provide full bookkeeping, tax filings, and fractional CFO advisory. May I ask what entity you operate and roughly your annual turnover?"

VISITOR:
"We are an S-Corp with 18 employees, around \$2.8M revenue."

AI CONSULTANT:
"Our Premier Advisory Retainer fits your scale perfectly. Would you like me to book a 20-min discovery call with Senior Partner Marcus Vance?"

✓ Qualified: Tier 1 Retainer Synced to CRM

+280%

Off-Hours Lead Capture Yield
Converts night & weekend traffic

< 30 Seconds

Automated Partner Briefing
Delivered straight to Slack or Email

Zero Headcount

Staffing Overhead
Integrates with Karbon, TaxDome & Calendly

Give Your Website an AI Accounting Consultant.

Engage. Understand. Qualify. Convert.

Request a Personalised Demonstration